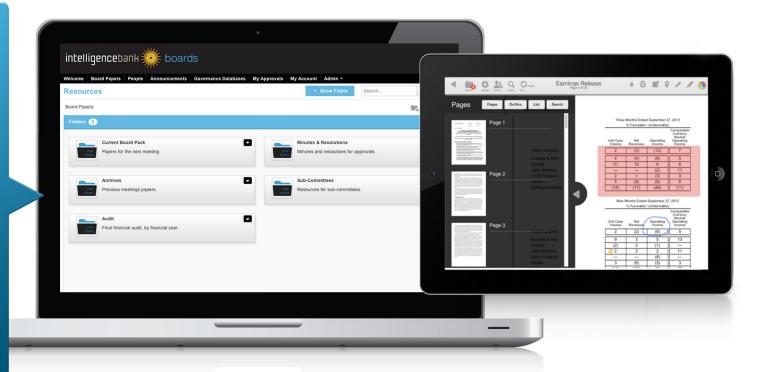


Welcome to IntelligenceBank Boards



OVERVIEW

IntelligenceBank
Boards is an electronic
board portal solution
that gives you, as a
director or committee
member, instant access
to current board packs,
archives and other
resources. With the
IntelligenceBank iPad
App, you can even read
and annotate files when
you are 'offline'.



IntelligenceBank Boards can be accessed online via the web or through our iPad App

Telephone Briefing Sessions

If you would like to schedule a telephone briefing session with a friendly member of the IntelligenceBank team, please email us at boards@intelligencebank.com and we will be in touch to schedule a one-on-one session on how to use the platform.

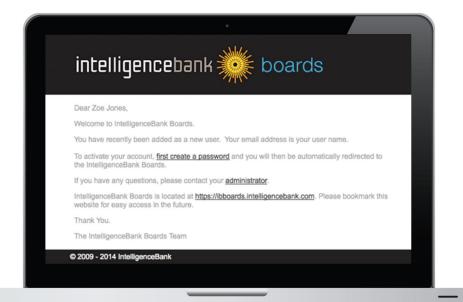


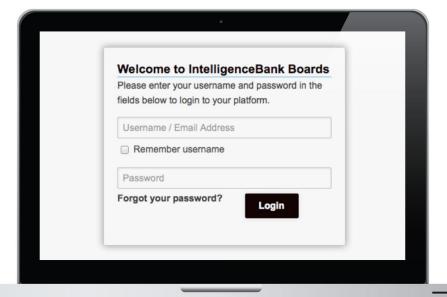
Let's Begin

If you feel comfortable logging in by yourself, on the next page are some of the key things you need to do to start using your board portal.



GETTING STARTED







STEP 1. Welcome Email

When the Administrator adds you as a user to your board portal, you will receive a welcome email to set up your password.



STEP 2. Logging In

Your username and password can be used when you access the platform from a computer, as well as for the iPad App.

To access your board portal platform – go to your company's unique website address (or enter it into the iPad App), which is listed in the welcome email.

https://<yourcompanyname>.intelligencebank.

Then you will need to enter your username and password.

Username: Your email address

Password: The password you set from the

welcome email



STEP 3. Bookmark

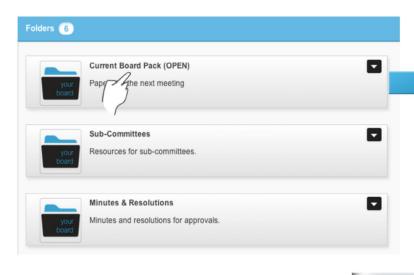
You may wish to bookmark your unique company URL for future reference.

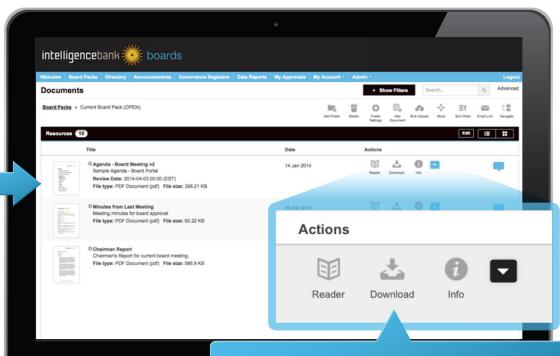
ACCESSING BOARD PACKS FROM A COMPUTER

Accessing Board Packs

Once you login to the web, you will be able to access the Folders or Agendas to which you have access – and that contain your files. You may have also received an automated email alert advising you that your papers are ready to read.

Simply click on the folder you wish to access and the papers will be displayed in the order of your agenda.

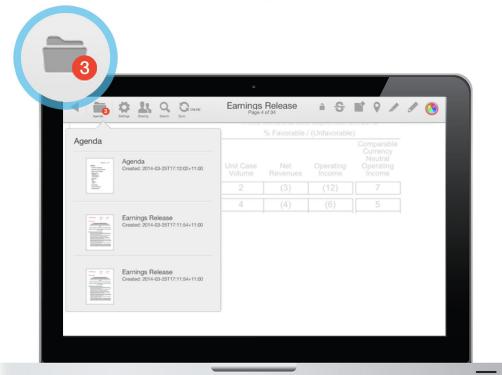




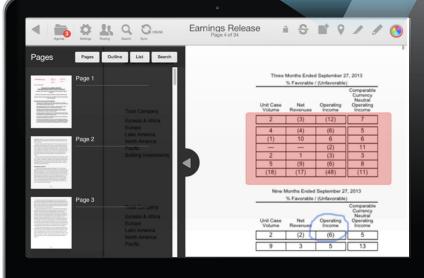
Download or Annotate Files

Depending on the access rights you have been granted, you can download files onto your computer, by clicking on the 'Download" button – or you can read and privately annotate them online by clicking on the "Reader" button.

READING AND ANNOTATING BOARD PACKS







The Document Reader

The document reader can be used with IE10+, Safari, Chrome and Firefox browsers.

When you open up the document reader – on the top left navigation bar, you can view the agenda and file settings on the left.

On the top right, you can create private annotations with comments.

When you are ready to privately annotate your files, you can choose to strike through, box, pin, highlight or freehand draw – all of which can be color coded.

On the left side panel, you can easily navigate through pages, via your annotations or the outline.

Your private annotations will automatically sync between devices every 5 minutes until you choose to permanently delete them. You can also choose to perform a sync action at any time.

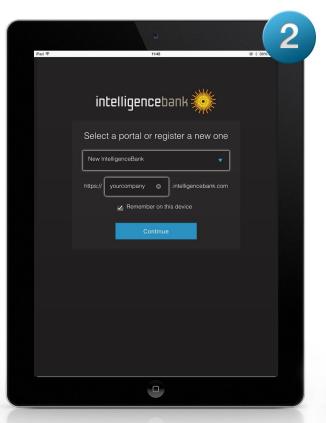
Annotations are tied to document versions and from the reader you can switch back and forth between versions if necessary.

ACCESSING BOARD PACKS FROM AN IPAD

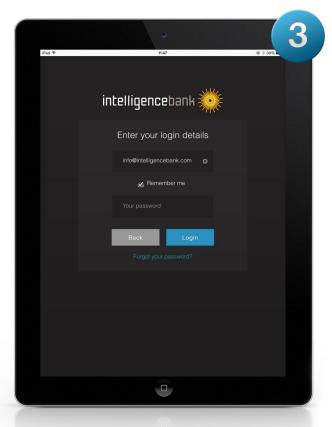
To download and login to the iPad App here are the steps to follow:



Step 1: From your iPad, visit the App Store, search for "IntelligenceBank" or "BoardHub" and download the free IntelligenceBank App.



Step 2: Type in your platform's name – i.e. companyname.intelligencebank.com



Step 3: Add your username (email address) and your secure password you have set from the welcome email.

If you have forgotten your password, at any time you can reset it by clicking on the "Forgot your password?" link.

ENTERING THE IPAD APP

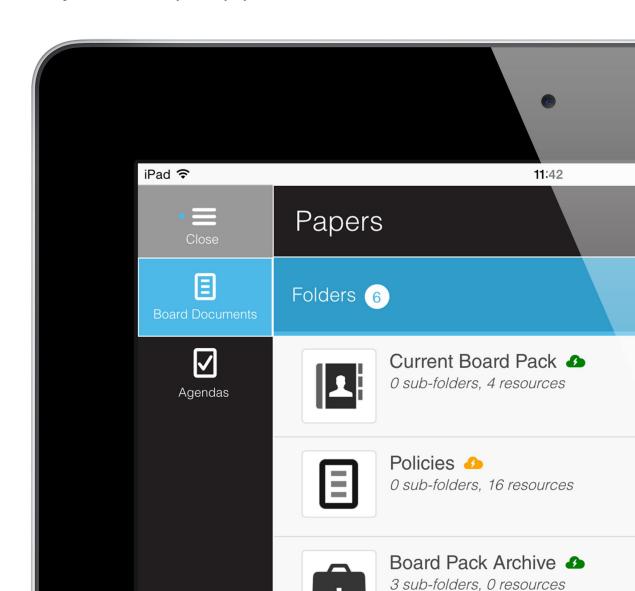
The purpose of the iPad App is to make it easy for Directors to securely access board papers and privately annotate in an offline environment.

Directors can access files from either the Board Documents or the Agendas area. Both areas offer Sync options, making it easy to always have the required papers available offline.

Board Documents shows you all the folders and files that are available from the web and that you can download for offline access.

Agendas shows you each meeting agenda that has been created with direct access to the files that are part of it.

Note: The area names displayed in the app left-side menu will mirror how these two tools are named on the web portal.



ACCESSING FILES ON YOUR IPAD

When you login to the app, you will see folders and agendas that you have access to online.

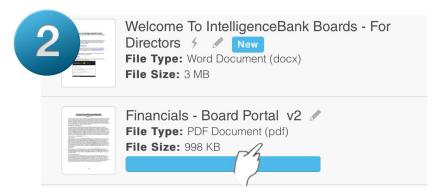
There are two ways to download files for offline access:



Sync All Files in a Folder or Agenda to Device

Next to each folder or agenda, there is a sync button, which will sync all files in it down to your device. If there are sub folders, these will be synced as well.

A synced folder or agenda will show this icon when up to date.



Download Individual Files to Device

If you want to download specific files, simply go into each folder or agenda and download files to the device by tapping on each file. This icon \$\forall \text{ will appear once available offline (i.e. download is completed).}

To start reading and privately annotating files, just tap the file again.



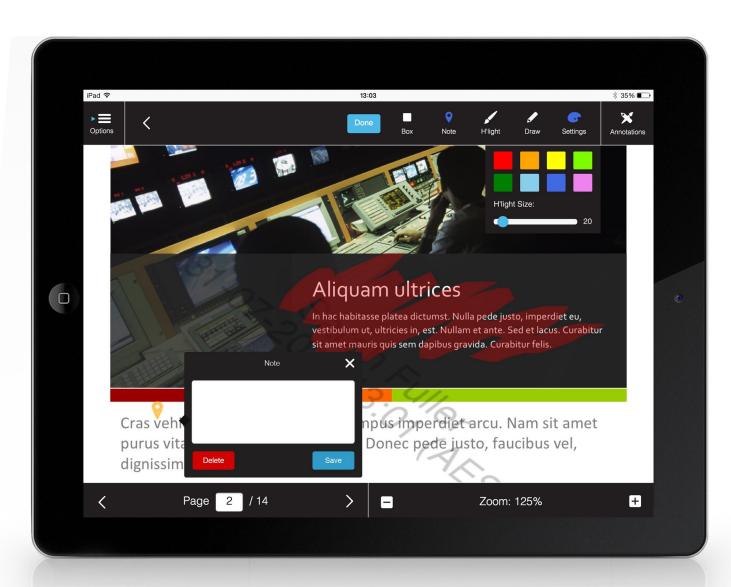
Check for Updates and Sync your Annotations

When you are offline, you can access any synced content and files downloaded to your device.

You can check for updates on your synced content, or save your annotations to the web at anytime by tapping on the Update action.

READING AND ANNOTATING DOCUMENTS

Once downloaded, you can open files in the document reader and privately annotate them.



Navigate

When you open up the document reader - on the left side, there is an Options tab where you can easily navigate through pages, the document outline or existing annotations.

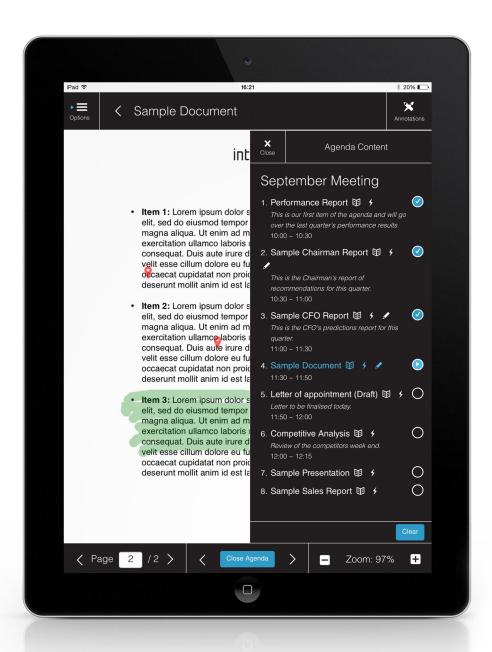
Private Annotations

The Annotations tools are on the top right side. You can add a box, a highlight, a note or draw.

Once an annotation is added, you can also tap it to attach a comment.

Note annotations display the comment box automatically once added.

NAVIGATING THE AGENDA CONTENT



You can navigate through your agenda content directly from the document reader.

Each agenda item can feature additional details such as a Description, a Start and End time, as well as a Presenter.



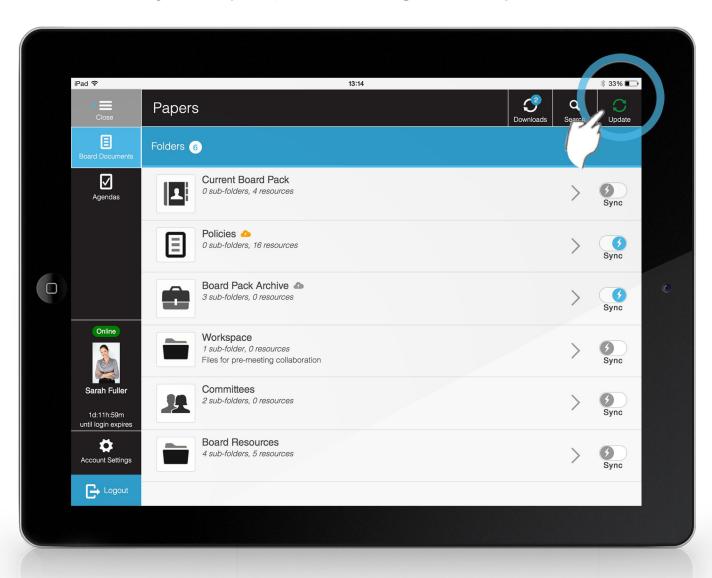
A handy 'remote' on the bottom bar allows you to easily Open/Close the Agenda as well as go to previous and next items.

UPDATING YOUR CONTENT

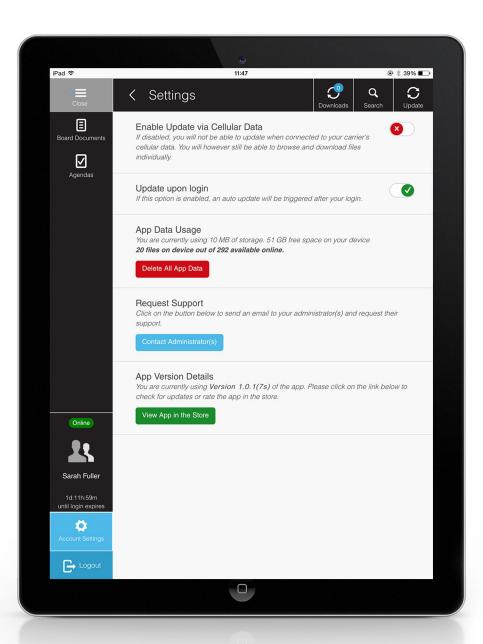
Check for Updates and Sync your Annotations

You can check for updates on your synced content, or save your annotations to the web at anytime by tapping on the Update action.

When a sync is completed, the icon will flash green for a couple of seconds.



APP SETTINGS



At the bottom of the left-side menu you can access an **Account Settings** area which features the following options:

- Enable or Disable Updates via Cellular Data
- Enable or Disable an automatic check for Updates upon Login
- Summary of your App Data Usage, with an indicator of the total number of files on device out of the total available online
- A direct link to Contact your portal Administrators via Email
- A direct link to the App's page on the App Store



More Questions?

If you have additional questions,
email our Help Desk at
helpdesk@intelligencebank.com
or call us on:
+61 3 8618 7800 (Australia)
+1 855 241 0150 (US & Canada)